



Filing ID #10027598

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Jeff Fortenberry  
**Status:** Member  
**State/District:** NE01

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2018  
**Filing Date:** 05/15/2019

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
C. Gregory Write, Inc., 100% Interest [OL]	SP	\$1,001 - \$15,000	S-Corp	\$50,001 - \$100,000	<input type="checkbox"/>
LOCATION: Lincoln/Lancaster, NE, US					
DESCRIPTION: Writing, editing and research business founded in 2014					
Gloria Deo, Inc., 50% Interest [OL]	JT	\$100,001 - \$250,000	S-Corp Income	\$15,001 - \$50,000	<input type="checkbox"/>
LOCATION: Lincoln/Lancaster, NE, US					
DESCRIPTION: Retail Book and Gift Stores					
COMMENTS: Valuation based on accounting estimates of inventory and income.					
Mainstar Trust FBO Jeffrey Fortenberry IRA ⇒ Mainstar Trust Cash Account [IH]		\$15,001 - \$50,000	None		<input type="checkbox"/>
Mainstar Trust FBO Jeffrey Fortenberry IRA ⇒ Mainstar Trust Self-Directed IRA [PS]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Purchase of stock through a private placement memorandum in a self directed IRA. A management organization for physician groups, headquartered in Commack, New York.					
Pepex Biomedical, Inc. [PS]	JT	\$15,001 - \$50,000	None		<input type="checkbox"/>
DESCRIPTION: Medical device research company.					

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income</b>	<b>Tx. &gt; \$1,000?</b>
Piedmont Shopping Center, LLC ⇒ Piedmont Shopping Center [RP]	JT	\$1,000,001 - \$5,000,000	LLC Income	None	<input checked="" type="checkbox"/>
LOCATION: Lincoln, Lancaster, NE, US					
DESCRIPTION: Share of ownership in multiple member LLC.					
COMMENTS: Asset value of approximately 6M based on estimate of appraisal after completion of real estate rehabilitation and new leases. (20 percent ownership held jointly with spouse)					
TIAA CREF Retirement Mutual Funds ⇒ TIAA CREF Retirement CREF Global Equities [MF]	SP	\$1,001 - \$15,000	Tax-Deferred	None	<input checked="" type="checkbox"/>
TIAA CREF Retirement Mutual Funds ⇒ TIAA CREF Retirement, CREF Stock Fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred	None	<input checked="" type="checkbox"/>
Union Bank Checking Account [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input checked="" type="checkbox"/>

\* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

## SCHEDULE B: TRANSACTIONS

<b>Asset</b>	<b>Owner</b>	<b>Date</b>	<b>Tx. Type</b>	<b>Amount</b>	<b>Cap. Gains &gt; \$200?</b>
Mainstar Trust FBO Jeffrey Fortenberry IRA ⇒ Practice Management of America, Inc. [PS]		01/22/2018	P	\$15,001 - \$50,000	
LOCATION: US					
DESCRIPTION: Purchase of stock through a private placement memorandum in a self directed IRA					

\* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

## SCHEDULE C: EARNED INCOME

<b>Source</b>	<b>Type</b>	<b>Amount</b>
Catholic University of America	Teaching	\$3,270.00
C. Gregory Write, Inc.	Spouse Salary	N/A

## SCHEDULE D: LIABILITIES

<b>Owner</b>	<b>Creditor</b>	<b>Date Incurred</b>	<b>Type</b>	<b>Amount of Liability</b>
	Cornhusker Bank, Lincoln, NE	December 2015	Guarantor of Real Estate Loan for Piedmont Shopping Center, LLC	\$1,000,001 - \$5,000,000
SP	Union Bank	July 2015	Commercial line of credit for Gloria Deo, Inc.	\$15,001 - \$50,000
JT	Cornhusker Bank, Lincoln, NE	March 2013	Home Mortgage	\$100,001 - \$250,000
JT	Cornhusker Bank, Lincoln, NE	June 2013	Home equity	\$50,001 - \$100,000
JT	Cornhusker Bank	June 2015	Loan for Home Geo-thermal Unit	\$10,000 - \$15,000
SP	Union Bank	July 2015	Construction/ remodel loan for Gloria Deo, Inc.	\$100,001 - \$250,000

#### SCHEDULE E: POSITIONS

<b>Position</b>	<b>Name of Organization</b>
Member	Piedmont Shopping Center, LLC
Employee, teacher	Catholic University of America

#### SCHEDULE F: AGREEMENTS

None disclosed.

#### SCHEDULE G: GIFTS

None disclosed.

#### SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

<b>Source</b>	<b>Trip Details</b>				<b>Inclusions</b>		
	<b>Start Date</b>	<b>End Date</b>	<b>Itinerary</b>	<b>Days at Own Exp.</b>	<b>Lodging?</b>	<b>Food?</b>	<b>Family?</b>
Food for the Hungry, Inc.	04/2/2018	04/5/2018	Omaha, NE - Port-au-Prince, Haiti - Les Anglais, Haiti - Kansas City, Missouri	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
The Aspen Institute, with support from various foundations	05/28/2019	05/3/2019	Omaha, NE - Helsinki Finland - Tallinn, Estonia - Lincoln, NE	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
George Washington University Nuclear	09/28/2019	09/30/2018	Washington, DC - Queenstown, MD -	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Trip Details					Inclusions		
Source	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
Security Working Group			Washington, DC				

## SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

## SCHEDULE A AND B ASSET CLASS DETAILS

- Mainstar Trust FBO Jeffrey Fortenberry IRA  
DESCRIPTION: Stock held in self-directed IRA account
- Piedmont Shopping Center, LLC (Owner: JT)  
LOCATION: Lincoln/Lancasater, NE, US
- TIAA CREF Retirement Mutual Funds (Owner: SP)

## EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

**IPO:** Did you purchase any shares that were allocated as a part of an Initial Public Offering?

Yes  No

**Trusts:** Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?

Yes  No

**Exemption:** Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption?

Yes  No

## CERTIFICATION AND SIGNATURE

I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the best of my knowledge and belief.

**Digitally Signed:** Hon. Jeff Fortenberry , 05/15/2019